



ACRLMetrics

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Bob Dugan
University of West Florida Libraries

Objectives

- using an internal statistical management information system (MIS)
- aligning library strategic plan with Performance Indicators and operations budget
- demonstrating use of ACRLMetrics via a practical case

Internal MIS

- create a “container” to store the data requested to fill out ACRLMetrics and other surveys as well as for specific internal use
 - display “popular surveys” (2 - pdf)
 - display “spreadsheet example” (2 – ss)

Internal MIS

- design the container to store information that you will find useful internally
 - display “custom pages from the MIS” (2 - ss)

Internal MIS

- using your own MIS container will enable you to create a variety of analysis
 - display “analysis spreadsheet examples” (2 - ss)

Performance Indicators

- align your strategic plan to the metrics you want to use
 - display “one page strategic plan” (doc)
 - display “plan to metrics worksheet” (ss)

ACRL Standards

- also, map ACRL standards to your strategic plan
 - display “plan to metrics with mapped ACRL standards” (same ss tab)

Strategic Finance

- align your strategic plan to your operational budget
 - display “costs for objective 1” (ss)
- enables you to answer the question: what does it cost to develop and manage the collection in a fiscal year?

Dugan's New Normal

- “Why do we need a library? It’s all on the Internet.”
- “The library is overstaffed.”

Practical Application

- the perception: the library is overstaffed
- to address the perspective: need to illustrate staffing levels and workloads
- most of the UWF staff is in Public Services, specifically Circulation and Reference

Measures

- three measures to use:
 - total staff in FTE
 - circulation as an output
 - reference as an output
- not to use
 - “user-invisible” staff; just wanted “visible” reference and circulation staff
 - “user-invisible” functions
 - e.g., books cataloged as an output

Measures

- trend analysis not helpful
 - staff levels down
 - circulation and reference outputs up
 - would just indicate efficiencies realized because of budget cuts
- peer institutions would be useful
 - maybe we are all overstaffed
 - display
 - “metrics to use for internal peer comparisons and benchmarks” (ss)

Starting Steps

- log into ACRLMetrics
- click the Reports link
- landing page: local tab → report tab
- click on the ACRL tab and explore the pages

Create a Template

- if you already have created a local report, use one of those
- if not, ACRL tab → Metrics Perspective
- picked Appendix B selected holdings ratio because it is short

Template

- for staffing, reference and circulation
- click Save as New Report. Now, make some changes.
- uncheck anything checked in Part 1 of Library Information.
- ensure period is set to 2010
- rename the report Test ACRL 2010
- save

Template

- click on Group
 - staffing is in Personnel
 - let's add #27 Total Staff FTE (highlight and add)
- Save.
- uncheck the three measures under Appendix B.
- Save.

Template

- look at Locations → Filters. Make sure it is just a \$. If not, then
 - click on locations
 - clear all
 - check include my location
 - apply
- Save.

Template

- Then, run.
 - only University of West Florida comes up.
 - I need to include peers.
 - click back arrow.

Template

- click on Locations.
 - expand all
 - find your peers and check the box
 - then at bottom, give the list a filter name
 - I have already done this, called UWF peers
- must re-check “include my location”
- click Apply
- Save

Template

- add to the description: UWF Peers
- Save.
- and then Run
 - see the difference
- back button
- Options tab
- check Average

Template

- let's add Circulation and Reference
 - click on Group
 - click on Output measures
 - circulation per 1,000 enrolled student FTE
 - reference transactions per enrolled student FTE
 - click on add
- Save.

Template

- Run
 - look at the charts for each measure will give you some hints
 - click on the Excel icon and download the data
 - open the link in new window
 - view the Excel table

The Report

- so, what did I tell the Provost?
 - display
 - bar charts used for Provost (doc)
 - our staffing levels are under average compared to our peers
 - we are at the top of performance in two of these workload indicators
 - I made other reports
 - display peer and aspirant chart comparisons (ss)

Perspectives

- students and faculty as users/consumers:
we lead the way while understaffed in
comparison to peers
- stakeholders such as the Board of Trustees:
we are a good investment in comparison to
peers
- library staff:
you rock!

Cool Things

- look at the Local side
 - hit Reports on the top right, then Local tab
 - note that CO automatically places the report you created in your “local” “Report” folder.
 - click on the report title and it reappears
 - you can reuse this report and change parameters such as the period
 - therefore, updating is easy!

Cool Things 2

- ACRLMetrics now includes NCES data
- take one of your reports; then save as a new report (Take 2)
- click on the Collection down arrow. Choose Select NCES Academic Libraries Survey
- Save.
- Run, and view the report

Cool Things 3

- Peers missing from the ACRL Collection appears. Note that there is data missing.
- note that the NCES data is 2010. The ACRLMetrics side was 2011.
 - to match up, CO has programmed this to “sync” and it uses the 2010 ACRL data.
- again, you can capture this to a spreadsheet, or use the graph symbol

Lessons

- create an MIS to store data
- when using ACRLMetrics
 - explore the tool to get comfortable
 - start with one or two measures
 - remember to save your changes
 - experiment; you cannot break it!
- it's like we tell our students -- to get better at it, you have to practice/do it

Cool Things 4

- Official Launch
- ACRLMetrics now includes IPEDS data
- special IPEDS data subset
- specifically for academic libraries

Contact Info

- Bob Dugan, University of West Florida,
Pensacola
rdugan@uwf.edu
- Counting Opinions for ACRLMetrics:
info@countingopinions.com